Partnership for Development Strategies based on Cultural Heritage and Sustainable Tourism

- Concept Note -

Context
The World Bank has acknowledged the importance of culture, cultural identity and cultural heritage as inherent elements of its development and poverty reduction assistance. Over the last decades the Bank has financed 241 operations (208 lending and 33 non-lending) having components in heritage conservation and promotion of local economy through sustainable tourism, for an investment of $4 billion. The current portfolio supports 117 operations under implementation (100 lending and 17 non-lending), for an actual investment of $1.8 billion specifically in cultural heritage and sustainable tourism.

Culture and its manifestations are seen as assets for economic development, elements that contribute to social cohesion, and as patrimony to be protected for future generations. Subsequently, developing countries are also recognizing the value of culture as part of their resource base; however, countries frequently lack financial resources to maintain cultural assets much less to develop the necessary infrastructure to facilitate new activities that lead to sustainable development. Often there is a lack of technical know-how and institutional capacity to mainstream cultural activities without disrupting the social fabric and damaging the natural environment.

With the advent of community-based cultural tourism and pro-poor tourism in Bank financed projects, cultural heritage has become a centerpiece for linking local economic development and poverty reduction. Evidence of linkages between cultural heritage projects and poverty reduction amongst the operations undertaken by the Bank over the last ten years is becoming clearer as the project portfolio matures and baseline data collection becomes more rigorous. At this point, there is a significant knowledge gap on the
impacts and types of projects being implemented successfully through different development agencies, donors and NGOs.

Objectives
We propose to establish a partnership that focuses specifically on cultural heritage and sustainable tourism in the development agenda. The role of the partnership would be to strengthen the synergies emerging amongst the various donors, foundations and private sector entities for the promotion of sustainable planning and management of cultural resources. The partnership would foster cross fertilization of knowledge amongst partners and would leverage funds for technical assistance including financing research, policy and program analysis, economic and sector studies, learning and training programs. In this way, poor communities would accrue benefits that include increased social capital and participation, job creation, enterprise development and private sector investment in order to reduce poverty while generating resources for environmental and cultural conservation.

Key features
- Knowledge and information sharing to facilitate coordination, documentation, representation and promotion of cultural initiatives;
- Support for results and impact studies to evaluate the effects of cultural activities on local and national economic development; and
- Assistance for technical advisory and analysis for investment operations which seek to protect and valorize cultural assets, develop educational programs aimed at creating awareness and appreciation of cultural identity and patrimony, support local business development, enable risk preparedness and institutional capacity building.

Linking Cultural heritage and Sustainable Tourism
Using cultural heritage and sustainable tourism as an economic asset for development is a concept that received backing during the United Nations Conference for Trade and Development (UNCTAD) in 1967 and was endorsed at that time by UNESCO. A follow-up UNESCO report, “Cultural Factors in Tourism” emphasized the importance of cultural and natural heritage for economic development.

Sustainable tourism can provide motivation and resources for the conservation of cultural heritage by playing a role in revitalization of physical heritage and by encouraging all manners of artistic expression. While heritage concentrates on the power of tradition, embodying cultural values of the past, sustainable tourism is a thoroughly dynamic sector that ties itself to trends in the market. Often the relationship between tourism and heritage invites tensions between those who seek to move forward and others who tend to look to the past. In truth, culture also changes, albeit at a slower pace and with more resistance, tending to evolve over longer periods of time. However, this tension can be resolved with the proper management and planning of tourism that recognizes the interdependence between the local community, physical heritage structures and heritage areas.

Bringing benefits such as improved housing through the revitalization of heritage areas, especially in cities is widely recognized as one of the “basic objectives of conservation” as seen in the ICOMOS Charter for the Conservation of Historic Towns and Urban Areas, Article 9 (1987). The Charter also states that the two main issues for conservation are to main-
tain or improve the quality of housing and to ensure its equitable supply. Moreover, an emphasis on residential uses is beneficial for preservation of historic districts since it ensures the maintenance of buildings.

Sustainable tourism relies on the authenticity of a heritage area and the “living culture” to attract tourists interested in participating in uniquely cultural experiences. There is huge potential to positively impact residents’ economic and social well-being since cultural tourism is not a small niche of tourism but is sustained by a large global market. Such a large market can ensure sustainable backward linkages, a range of products and services which can be produced by the host community and beyond without high import content to support cultural tourism thus contributing to long lasting economic development.

Rationale for the Bank's Initiative
Agencies specializing in culture or tourism have been developing guidelines on site management and tourism indicators however they do not have access to the range of projects and resources available at the Bank. It is proposed that the partnership be created between the agencies, foundations and donors who recognize the imperative in preserving culture and cultural landscapes within the daunting pressures of globalization. It is generally recognized that legitimizing and supporting the culture and heritage of poor and excluded groups can bring about profound improvements in self-esteem, energize communities, help them get organized, and assist them in finding new ways to improve their livelihoods. The new way of thinking enables the Bank to build social cohesion, leverage local assets for economic growth, and protect public goods.

Support for Cultural Heritage and Sustainable Tourism through Bank Projects
In the late 1990s, there was a surge of interest in culture within the Bank that produced many innovative approaches and projects, forging the foundation for our present work. Unfortunately, as is often the case, once interest and eventually resources shifted to new priorities, production of lessons learned, best practices and analytical work slowed down as well. Despite the slowdown, the Bank has continued to finance cultural heritage components within larger infrastructure and environment projects. The Bank often plays a catalytic role, attracting other donors and stakeholders, as it mobilizes multi-disciplinary teams to work on cultural heritage activities within a poverty reduction context. Cultural assets in developing coun-
tries are untapped sources for development which when considered in conjunction with
tourism development, produce increased access to cultural and natural sites, extend infra-
structure to local communities, and facilitate maintenance of bio-diversity and the envi-
ronment.

The Bank has also benefited greatly from the support of the Italian Government in provid-
ing funding for preparation of projects with cultural heritage components. Since 2000 the
Italian Trust Fund for Culture in Sustainable Development has financed 29 activities for $ 5.74 million. These activities are linked to 14 operations that have leveraged investments of $ 185.6 million to facilitate heritage conservation and tourism development.

**Partnership Model**

The Bank has produced in partnership with donors, specialized agencies and foundations
important projects, training seminars, workshops and knowledge and learning tools on cul-
tural heritage and sustainable tourism; however these efforts have been implemented
through initiatives limited in resources and scope. These fractured efforts result in unfo-
cused mandates and inconsistent approaches. Nevertheless, structured partnerships can
be used as an important mechanism to create understanding, build consensus and pro-
vide support for heritage conservation where resources are dramatically lacking.

The proposed partnership will be modeled on other successful programs such as InfoDev,
and would include essential elements such as a Framework Agreement, Donor Committee,
and Symposium. The model will focus on field tested knowledge of “what works” and em-
phasize experimentation, piloting and knowledge sharing. Having significant Bank projects
already under preparation and implementation involving culture, the emphasis for the
Partnership will be to encourage innovation and facilitate knowledge sharing amongst
operational teams, between agencies and to offer opportunities for further collaboration,
especially on the impacts of these investments for development outcomes.

The Framework Agreement will be the governing mechanism of the Partnership outlining
the general purpose and themes of the initiative as well as the responsibilities of each par-
ticipant organization. Suggested themes or areas of interest related to culture are heritage
conservation, local economic development, education and training, effects of climate
change, disaster risk management and sustainable tourism.

The Donor Committee will define specific priorities as well as establish integrated programs
to facilitate analysis and knowledge gathering, assist operations seeking to valorize cultural
assets, and produce helpful tools and guidance for operational teams. The core opera-
tional staff will be hosted in the Urban Unit of the Bank as the natural successor to the The-
matic Group on Cultural Heritage and Sustainable Tourism and will facilitate work plans
and contribute to coordination.

As the culmination of these efforts, a Symposium would be held regularly to formally ex-
change knowledge, share innovations and prepare strategies and work plans amongst the
various participant agencies. The funding for the Partnership would be contributed by the
members of the Donor Committee who will consist of bilateral donors, international institu-
tions, developing country governments and the Bank.